

## **Report to the Commissioners**

prepared by Lisa Sheppard, Director

**July 20, 2021**

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2019 actuals

FY 2020 annual targets

FY 2020 actuals

FY 2020 actuals as a percentage of annual targets

FY 2020 actuals as a percentage of FY 2019 actuals

FY 2021 actuals to date

FY 2021 annual targets

FY 2021 actuals as a percentage of FY 2021 annual targets

**The general target is 100% for FY 2021 to date, July 1, 2020-June 30, 2021,** keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

### **Data to note:**

- **All year-end data is reported.**
- **Nutrition**
  - The continuing impact of COVID can be seen in the number of total annual meals served, which exceeded 95,000 meals, 15,000+ meals higher than the pre-COVID average.
  - Many of the new home-delivered meal clients since March 2020 meet the normal criteria for the program and will likely continue indefinitely.
- **Information and Referral/Assistance**
  - I&R/A contacts continue to be high and significantly exceeded the annual target by 64%.
  - We have been open for in-office appointments and walk-ins since mid-March, and visits are steadily increasing (91 in June compared to 56 in April). We continue to provide a high volume of services via phone, email and other virtual formats, as many clients prefer the convenience. It is also more efficient, allowing for an increase in contact volume.
  - The increased contacts are likely the “new normal” given the aging demographic in our area and overall population growth.
- **Independent Living Services**
  - The number of clients receiving Independent Living services is at 84% of the target for the fiscal year due COVID-related issues and the continuing shortage of paid attendants, which

was a significant concern pre-COVID, but it is now a crisis. We are engaging in multiple efforts to address the problem.

- We have negotiated new rates with providers to boost attendant wages to increase recruitment and retention. The new agreements will be on the Commissioner agenda on 7/27/21.
  - In consultation with DPHHS, we are moving forward with a consumer-directed voucher system, modeled after the successful Lifespan Respite Program, that will give clients (especially those in more rural areas) more options for obtaining the care they need. We hope to have vouchers available within the next month.
  - In the meantime, we have implemented a waiting list for services for those clients for whom attendants cannot be found.
- **Benefits Counseling**
    - We substantially exceeded the target for FY 2022 for client savings by 104%, assisting individuals to save \$1,021,507 compared to \$623,758 last fiscal year.
    - We were able to offer the same or greater level of service this year as we did pre-COVID despite providing the majority of our services by phone, online, email and mail.
  - **Ombudsman**
    - Consults exceeded the FY 2021 target by 76% as well as FY 2020 actuals (1,758 consults this year compared to 1,406 last year). We hope consults will stabilize in the new fiscal year as COVID concerns hopefully abate.

## **AOA Administration**

### ***Budget and Contracts***

- **FY 2022:**
  - The submitted budget for FY 22 assumed flat federal and state funding as well as some additional COVID relief funding. MTDPHHS has now provided us the FY 2022 allocations. Overall, the regular Title III and Title VII Older Americans funding is in line with assumptions. The COVID relief funds, however, were distributed to us prior to the end of FY 21 and so will be carried over for use in FY 2022.
  - We are working on the FY 2022 MTDPHHS budget.
  - We will also receive Title III and Title VII ARPA funds through DPHHS, but we have not yet received a specific allocation. The deadline to expend these funds is September 30, 2024. As we get new information, we will move forward with developing a budget.
  - We will work with the Finance Department during the next amendment process to update the county budget with actual federal and state allocations.
- **FY 2021:**
  - Commissioners approved the final FY 2021 DPHHS budget/contract amendment, which included final federal grant awards for regular Title III funding (increase of \$25,626) as well as additional COVID-related funds comprised of \$20,536 in CARES Act funds and \$58,953 in funding from the Consolidated Appropriations Act passed in December (HDC5), for a total increase of \$105,115. The deadline to spend all non-ARPA COVID-related Title III and Title VII federal funds has been extended to September 30, 2022. This includes FFCRA, CARES Act and HDC5 funds.
  - We submitted final FY 2021 county budget amendments to Finance

### ***Building/Offices***

- Nothing to report.



## ***HR***

- We are in the process of filling an open position in Nutrition.

## **State/Federal/Legislative Issues**

- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services, funding and policies that support older Montanans.
  - We will meet in person in Butte July 28-29. We also meet monthly via conference call and have a joint call with the MTDPHHS State Unit on Aging (SUA) at least quarterly.
  - As part of a grant funded by the federal Administration on Community Living (ACL), M4A is working with senior centers across the state to upgrade their technology equipment/internet access to better support a wide-range of activities, education/training, networking and fundraising. M4A is also offering senior centers membership in the association and the opportunity to be part of an Advisory Council to M4A.
  - M4A is working on a joint project with MTDPHHS Adult Protective Services and Purdue University to determine how older Montanans are impacted by the opioid crisis and whether the state's efforts to connect them to treatment and services has been effective.
- National Association of Area Agencies on Aging (n4a) – n4a advocates for funding and policies that support older Americans and enable the aging services network to meet their needs; it provides training and technical assistance to us as members.
  - N4a is changing its name to USAging.
  - Several staff are attending the annual conference, which is being held virtually this week.

## **AOA Advisory Council**

- The Council met in person on July 8<sup>th</sup>. Topics includes program and budget updates, establishing a Nominating Committee for officer elections and by-laws review, the upcoming Area Plan on Aging (due March 2022), special projects and community outreach efforts.
- Of the current 14 members, six are new.
- Members voted to keep the day/time of the meetings the same and to return to a bi-monthly schedule. The next meeting will be September 9<sup>th</sup>, from 2:00-3:30 pm in the South Campus conference room.

## **Outreach/Education/Media/Events**

- 6/1/2021: KGEZ monthly interview about AOA services and aging concerns, 15,000
- 6/9/2021: AOA Summer newsletter, 500
- 6/15/2021: SMP Fraud Prevention presentation at Buffalo Hill Terrace, 20
- 6/15/2021: SMP ad in Buffalo Hill Terrace newsletter, 200
- 6/15/2021: KOFI WGO radio segment, dining room opening, 2,500
- 6/16/2021: KOFI WGO radio segment, Medicare Fair, 2,500
- 6/16/2021: Interview on Flathead Electric “What’s Going On” radio show – Program update
- 6/17/2021: Interview on Flathead Electric “What’s Going On” radio show – Medicare Fair
- 6/23/2021: hosted Medicare Virtual Fair at South Campus, 15
  - Multi-media promotion of event throughout June 58,000
- June 2021: Medicare 101 class available on AOA website; 17 views
- June 2021: KGEZ, 48 ads per month re. Benefits CheckUp
- June 2021: AOA ad on Smith’s pharmacy bags, 1000
- June 2021: Facebook and website updates



## **Nutrition**

- Onsite dining numbers are not yet on par with pre-COVID levels but are increasing. For example, the daily high number of diners at the South Campus is now 80+, up from the high 30s at our April opening.

## **I & R/Assistance/Ombudsman/Independent Living Services**

- Medicare and Benefits Counseling:
  - National Council on Aging Benefits Enrollment Center (BEC) grant (Oct 202-Sept 2021): We implement the grant in partnership with the Area VI Agency on Aging (Polson). The grant supports outreach and assistance to low-income Medicare beneficiaries to identify and enroll in programs that reduce their costs related to Medicare premiums, co-pays, out-of-pocket expenses, prescription drugs, home heating costs, etc. An application has been submitted for a new two-year grant cycle. If awarded, we will receive \$27,000 each year beginning this October.
    - This fiscal year we assisted Flathead County clients with 552 applications for money-saving benefits.
    - Staff participated virtually in the NCOA annual conference June 7-10.
- Veteran Directed Care (VDC) Program:
  - The Montana VA has significantly limited enrollment in the program statewide since March 2020. Only a small number of vets have been able to access the program, and only three have been from Flathead County. Statewide census in the program is declining. We have elevated our concerns to state and national leadership as outside of Montana the program is growing.
  - We have 31 vets enrolled, down from a high of 43 in February 2020. Some have passed away. Others have been denied continued enrollment at their 6-month reauthorization. We are offering vets assistance with their appeals.
- Independent Living Services: See the data section above for information on possible solutions to the worsening paid attendant shortage.
- Caregiver Support: The attendant shortage has had a particularly negative impact on our respite services.
- Ombudsman Program: Staff have resumed in-person visits but also continue to conduct consults with facility staff, residents and families via phone, email, zoom, etc. when necessary.
- Outreach/Education/Training: We are making plans to celebrate in October the 5-year anniversary of our move into the South Campus with a variety of onsite activities as well as an essay/photo contest.

**Senior Centers** - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- The Kalispell and Bigfork Centers have joined M4A and are participating in the technology grant from ACL.
- Annual senior center service agreements are the Commissioners' agenda on 7/27/21.



# July 2021 Report: Performance Measures Tables - June 2021 stats (FY 2021)

100.00%

MEASURE	FY 2019 Actuals	FY 2020 Target	FY 2020 Actuals	FY 2020 % of Target	FY 2020 as % FY 2019	June	Total Last Report	Total/Avg. to Date	FY 2021 Target	% Target
# Receiving Independent Living Services	98	119	86	72%	88%	3	88	91	110	83%
# Receiving Meals on Wheels	401	450	554	123%	138%	24	630	654	450	145%
# Seniors Receiving Congregate Meals	1,538	1,400	1,408	101%	92%	108	416	524	1,400	37%
# Transit Demand Response Unduplicated Riders	333	335	266	79%	80%	N/A	630	630	335	188%
Client Savings from Benefits Counseling	N/A	\$400,000	\$623,758	156%	N/A	\$53,905	\$967,602	\$1,021,507	\$500,000	204%
% of IL Service Recipients at Moderate to High Risk of Institutionalization	93%	88%	87%	99%	94%	81%	82%	81%	88%	92%
Per Meal Cost of Nutrition Services	\$6.80	\$7.00	\$7.65	109%	113%	\$7.01	\$6.65	\$7.01	\$7.50	93%
% Overall Satisfaction with Nutrition Services from Annual Survey	97%	97%	100%	103%	103%	N/A	100%	N/A	97%	N/A
% Overall Satisfaction with Independent Living Services from Annual Survey	97%	90%	moved to next FY	N/A	N/A	N/A	92%	N/A	90%	N/A
Maximum annual number of transportation complaints	4	25	15	60%	375%	N/A	17	17	25	68%
WORKLOAD INDICATOR	FY 2019 Actuals	FY 2020 Target	FY 2020 Actuals	FY 2020 % of Target	FY 2020 as % FY 2019		Total Last Report	Total/Avg. to Date	FY 2021 Target	% Target
<b>Nutrition</b>										
Total Meals	78,515	80,000	90,538	113%	115%	8,254	87,319	95,573	80,000	119%
MOW	46,658		62,696	N/A	N/A	6,151	73,143	79,294		
Social Dining (Congregate)	31,857		27,842	N/A	N/A	2,103	14,176	16,279		
Nutritional Assessments Conducted	1,858	2,000	1,311	66%	71%	100	1816	1,916	1,800	106%
<b>Transportation</b>							Transit not part of AOA as of 3/15/2021			
Total Ride Count	116,017	100,000	88,395	88%	76%	0	40,024	40,024	100,000	40%
Demand Response Count	26,784	30,000	20,971	70%	78%	N/A	21,926	21,926	30,000	73%
City, Commuter and Other Ride Count	89,233	70,000	67,424	96%	76%	N/A	18,098	18,098	70,000	26%
Outreach/Special Events	31	25	41	164%	132%	N/A	16	16	30	53%
<b>Information and Referral/Assistance</b>										
Outreach, Information, Referral Contacts	26,014	18,000	23,823	132%	92%	2,252	27,331	29,583	18,000	164%
Outreach/Education/Media Efforts	129	120	139	116%	108%	17	114	131	120	109%
<b>Independent Living</b>			57%							84%
Homemaker Hours	1,433	2,000	1,853	93%	129%	147	2119	2,266	1,430	158%
Escorted Transportation Rides	886	2,174	747	34%	84%	46	694	740	1,500	49%
Respite Hours	1,793	2,857	1,757	61%	98%	52	1615	1,667	2,142	78%
Comm. Support/Sr. Companion Hours	508	1,471	383	26%	75%	20	0	20	750	3%
Personal Care Hours	146	174	183	105%	125%	21	277	298	150	199%
<b>Benefits Counseling</b>										
Benefits Counseling Hours of Service	1,193	500	694	139%	58%	54	676	730	650	112%
<b>Ombudsman</b>										
Ombudsman consults/cases opened	1,116	1,000	1,406	141%	126%	179	1579	1,758	1,000	176%